The Greater Downtown

A Fact-Base Summary of Information
Placed in Context and Perspective

City of Dayton–Department of Planning and Community Development
3/30/09

What is the Greater Downtown?

- It is the central ring of a city that grew and developed in three consecutive general rings over time.
- It generally coincides with the geography of 19th century Dayton and is connected by the Great Miami River and her tributaries.
- It is the vital, connected and integrated urban economic system of villages, districts, neighborhoods, corridors, gateways and institutions that ring the historic downtown core.
- It is the real/functional town center of the city and the perceived symbolic and historic center for the region.

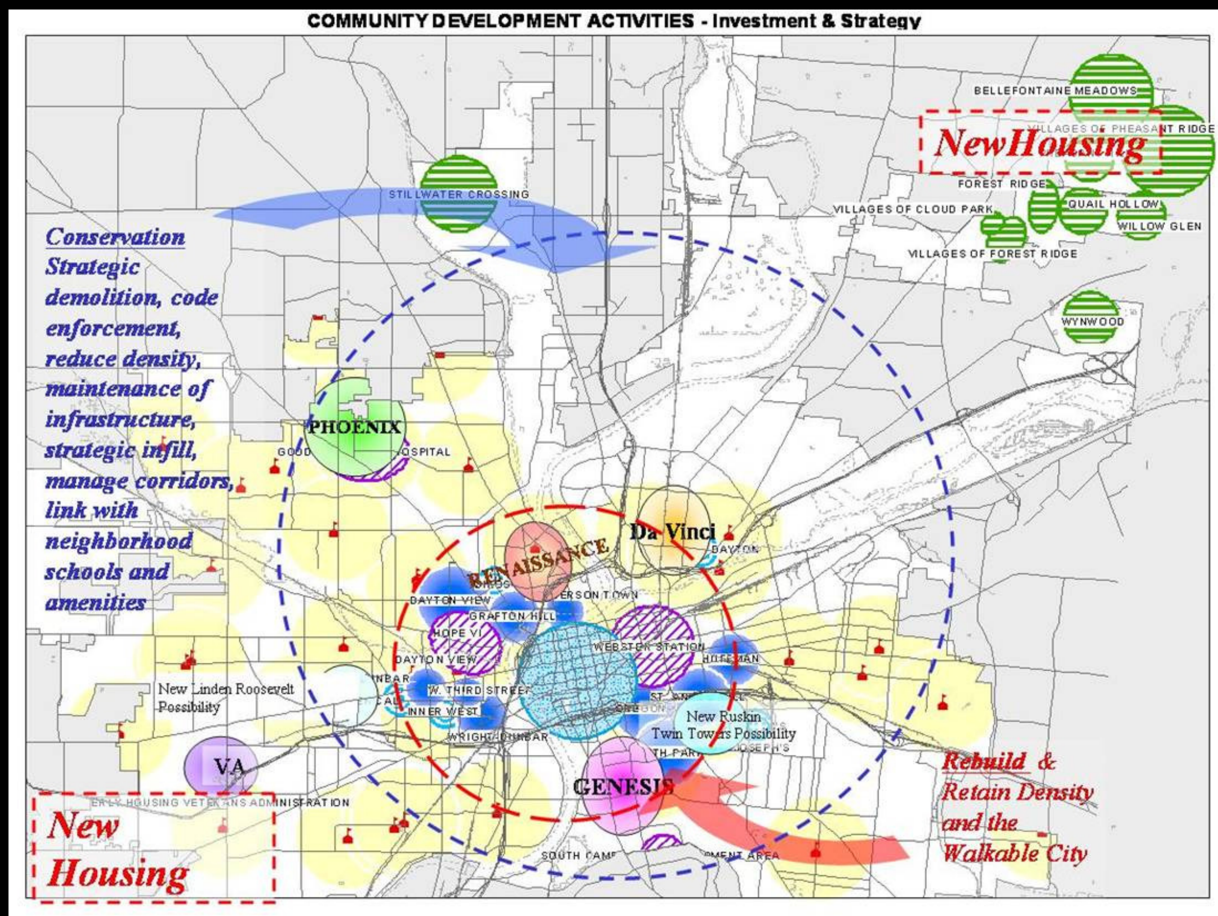
The Greater Downtown Conversation:

Three Downtown Planning Districts Surrounded by Ten Adjacent Planning Districts, Touching Six Priority Board Areas and Seven Historic Districts, Triangulated by Major Anchor Institutions and Connected by the Rivers

Summary of Situation Dayton: Transition & Paradox

- The Greater Downtown is in the midst of a long-term repositioning, renewal and reinvestment trend that represents real economic strength for Dayton.
- The Greater Downtown trends of advancement are counterbalanced with the trends of retreat in certain sectors.
- Total estimated investment in the Greater Downtown from 2001 actuals projected to 2010 is in excess of $1,500,000,000.
- The jobs contained within the geography of the Greater Downtown account for generating approximately 35% to 40% of the total jobs-generated income tax revenue for the City.
- The Downtown Core accounts for about half of that revenue or approximately 20% of the total jobs-generated income tax revenue for the City.

From the late 1950's through the 1990's, the Greater Downtown experienced a contraction in overall activity as well as a decrease in built density. Today, the Greater Downtown is shifting to an increase in density while much of the rest of Dayton is in the midst of an overall reduction of both building density and land use activity.



Shifting Trends of Greater Downtown

- Regional Spreading Out and Sprawl in a Slow/No-Growth, Weak Market
  - Since 1950, the region has increased its size by 400% while the population has only slightly more than doubled.
  - Regional sprawl and dispersal are shifting jobs and population to adjacent jurisdictions and counties with retail following (Montgomery, Miami, Greene – Downtown Dayton lost between 1/4 to 1/3 of its job base between 1985 and 1995).
  - Dayton's job base is contracting (region is on downward decline since 2000).
  - Dayton’s population is contracting (regional growth is flat).
  - The Greater Downtown has been – and is – in a long term repositioning in order to respond to shifts in the marketplace.

Shifting Trends of Greater Downtown

- Contracting, Declining, Less, Fewer (Sampling):
  - Manufacturing & Warehousing – NCR factories, Frigidaire, DELCO, Sunshine Biscuit, GH&R Foundry, etc. (tens of thousands of jobs lost).
  - Traditional General Merchandising and Neighborhood Retail (Retailing has been following rooftops for two generations and requires density of activity and is housed in new forms) (thousands of jobs lost).
    - Sears, Rike's, Elder-Beerman, Thal's, Donenfeld's, Arcade, Liberal, A&P, etc.
  - Old, Marginal, Obsolete and Deteriorated Housing Product – Downtown, East Dayton and Inner West Urban Renewal Projects, Nuisance Abatement, etc.
  - Infrastructure/Corridors – City is playing 'catch-up' with maintenance of basic infrastructure; consistency in attractiveness & maintenance of strategic corridors is lacking.
  - General Purpose, Commercial Office Space in the CBD
    - Banking and finance industry revolution
    - Emergence of internet and digital age communication
      - Office space product without capacity for today's wiring needs
    - Emergence of market demand for larger, open floor plates
    - Ever-expanding oversupply of regional office space product

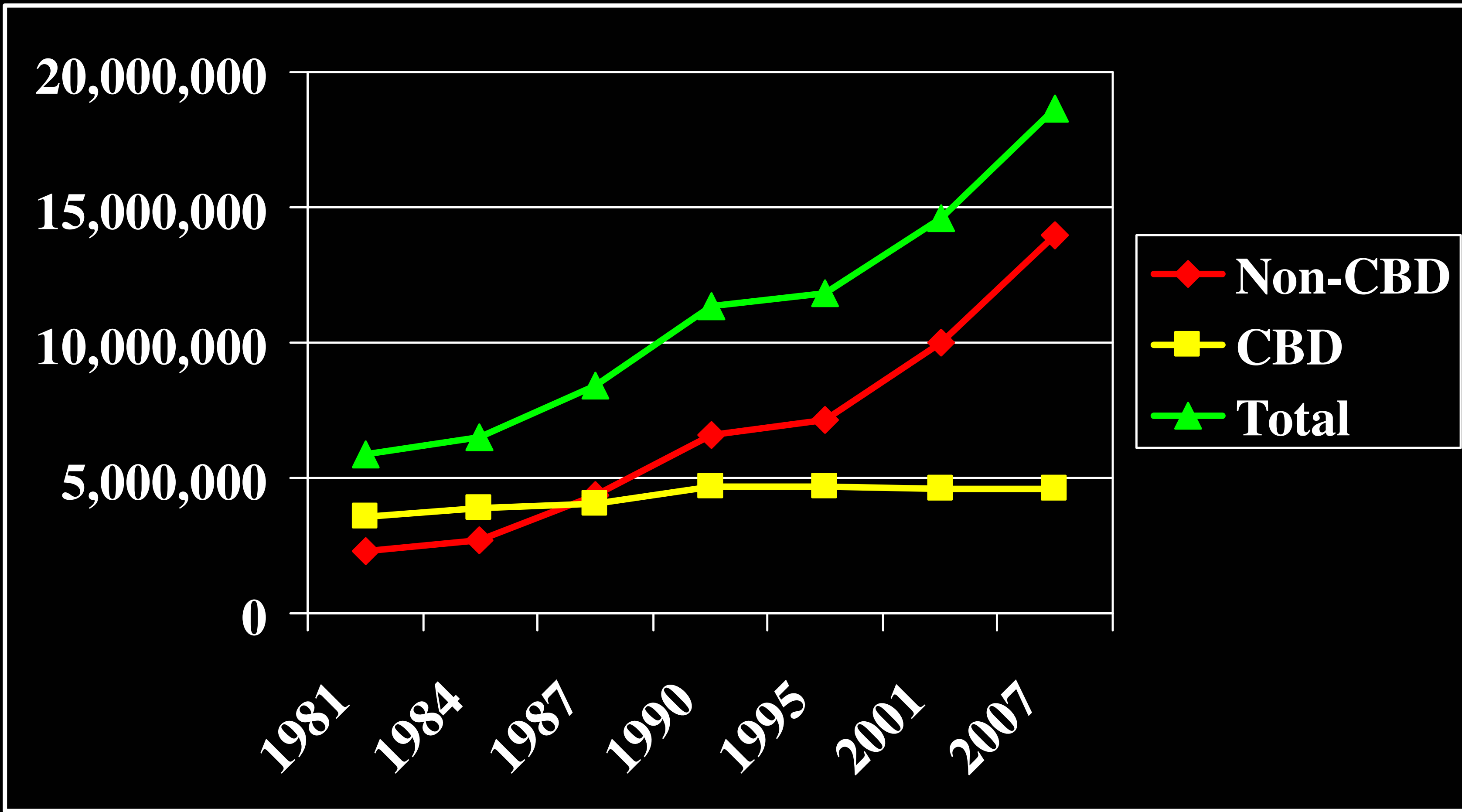
Regional Commercial Office Space Trends

An Expanding Inventory of Commercial Office Space in a Flat-Growth Region

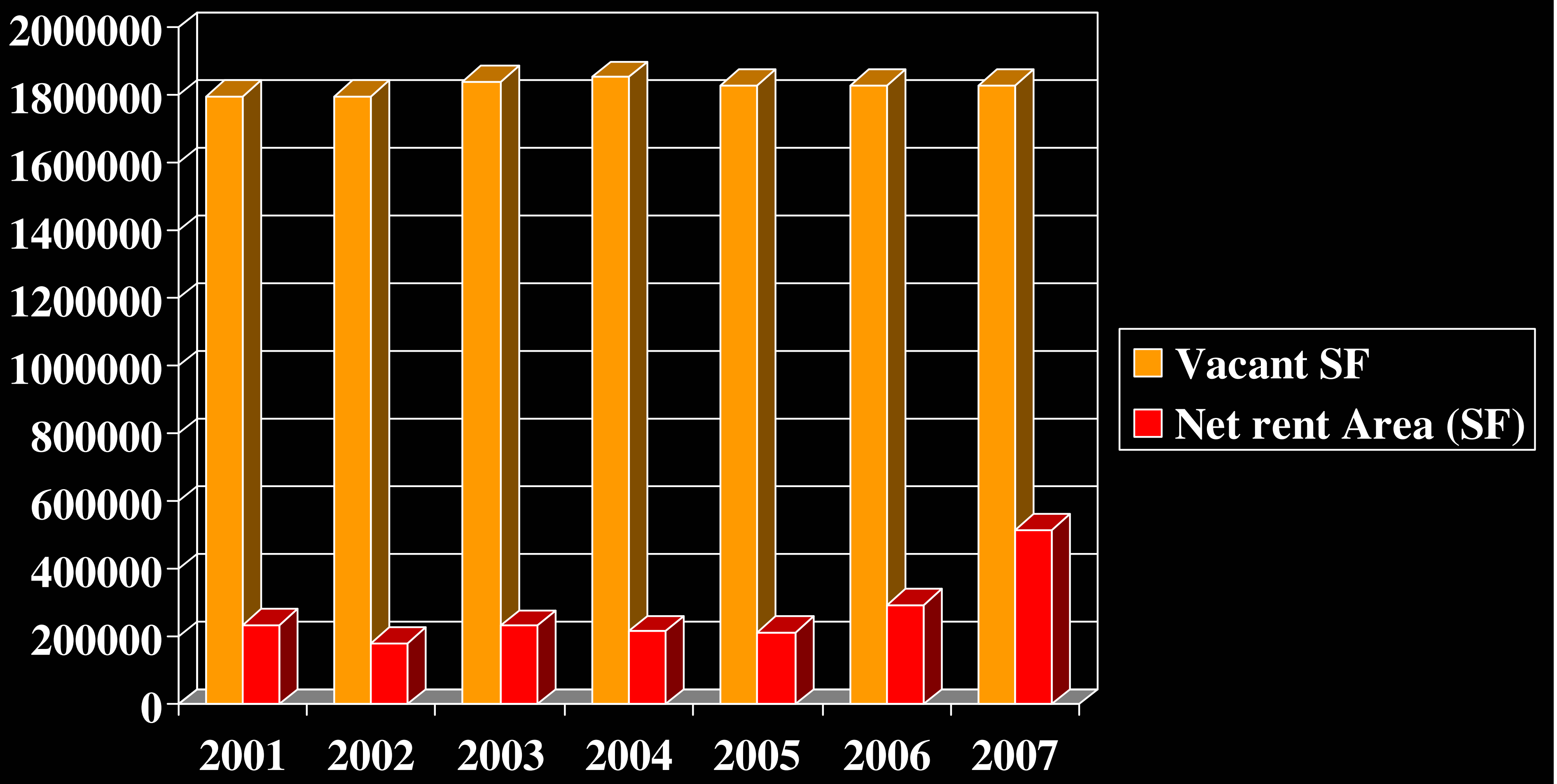
	1981	1984	1987	1990	1995	2001	2007
Non-CBD Regional Space (s.f.)	**2,279,718**	2,666,613	4,364,062	6,613,203	7,113,103	10,000,000	**14,000,000**
Regional Vacancy Rate	NA	31%	28%	27%	10%	NA	NA
CBD Space (s.f.)	**3,579,984**	3,859,000	4,021,621	4,720,928	4,720,928	4,612,786	**4,979,849**
CBD Vacancy Rate	15%	14%	19%	29%	20%	14%	29%
Regional Space - Total	**5,859,702**	6,525,613	8,385,683	11,334,131	11,834,031	14,600,000	**19,000,000**

Regional Commercial Office Space Trends

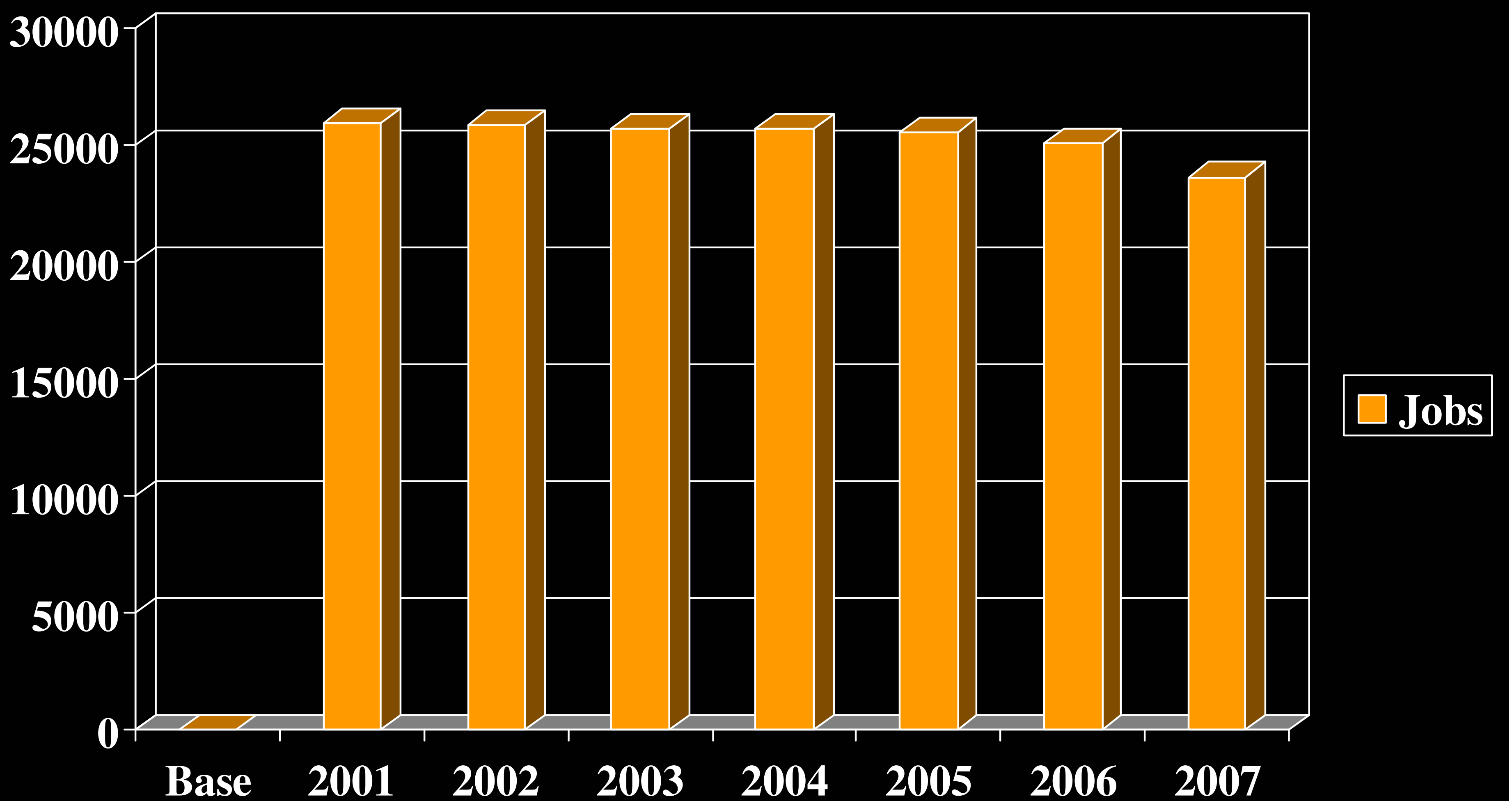
An Expanding Supply of Office Space Supply in a No-Growth Region



Downtown CBD Commercial Office Occupancy Trend

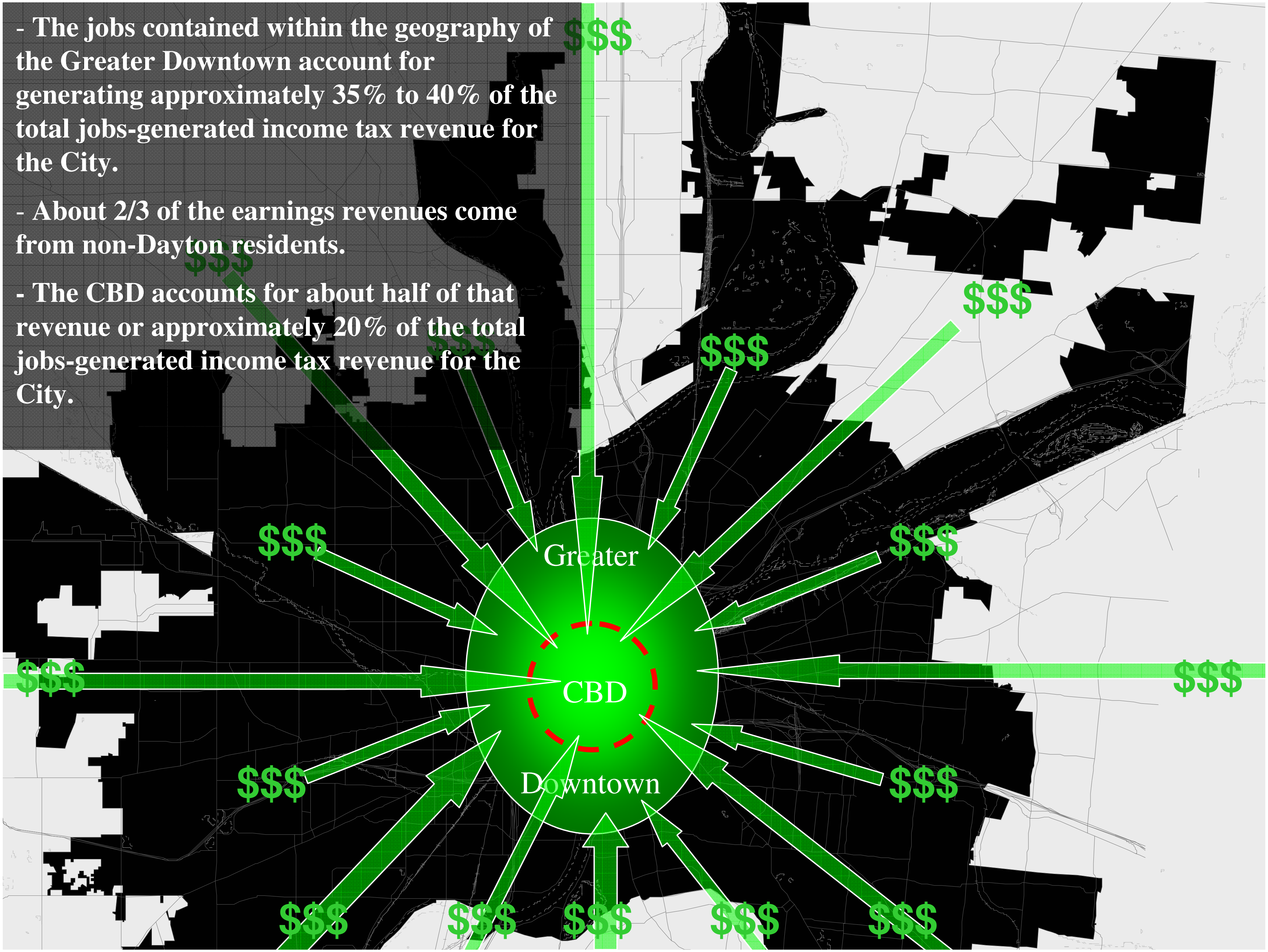


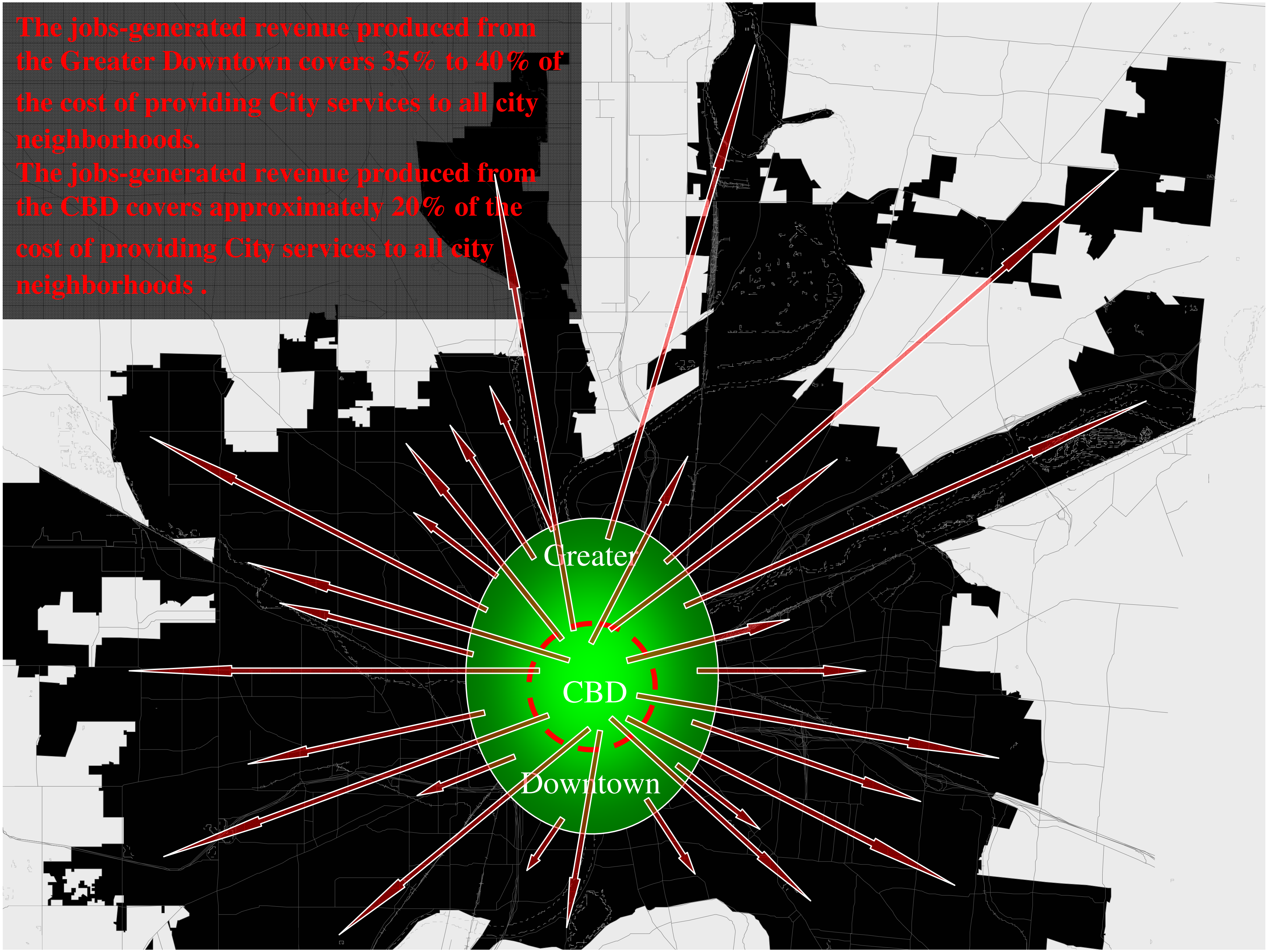
Downtown CBD Job Trend



Greater Downtown Job Snapshot – 2007 - 2008

• Downtown	23,600
• Surrounding Districts	19,000 (est.)
• Sub for Greater Downtown	42,600±
• 2007 City Job Count (est.)	110,000
• Greater Downtown % (est.)	35% - 40%


- The jobs contained within the geography of the Greater Downtown account for generating approximately 35% to 40% of the total jobs-generated income tax revenue for the City.
- About 2/3 of the earnings revenues come from non-Dayton residents.
- The CBD accounts for about half of that revenue or approximately 20% of the total jobs-generated income tax revenue for the City.
Greater
CBD
Downtown
$$$

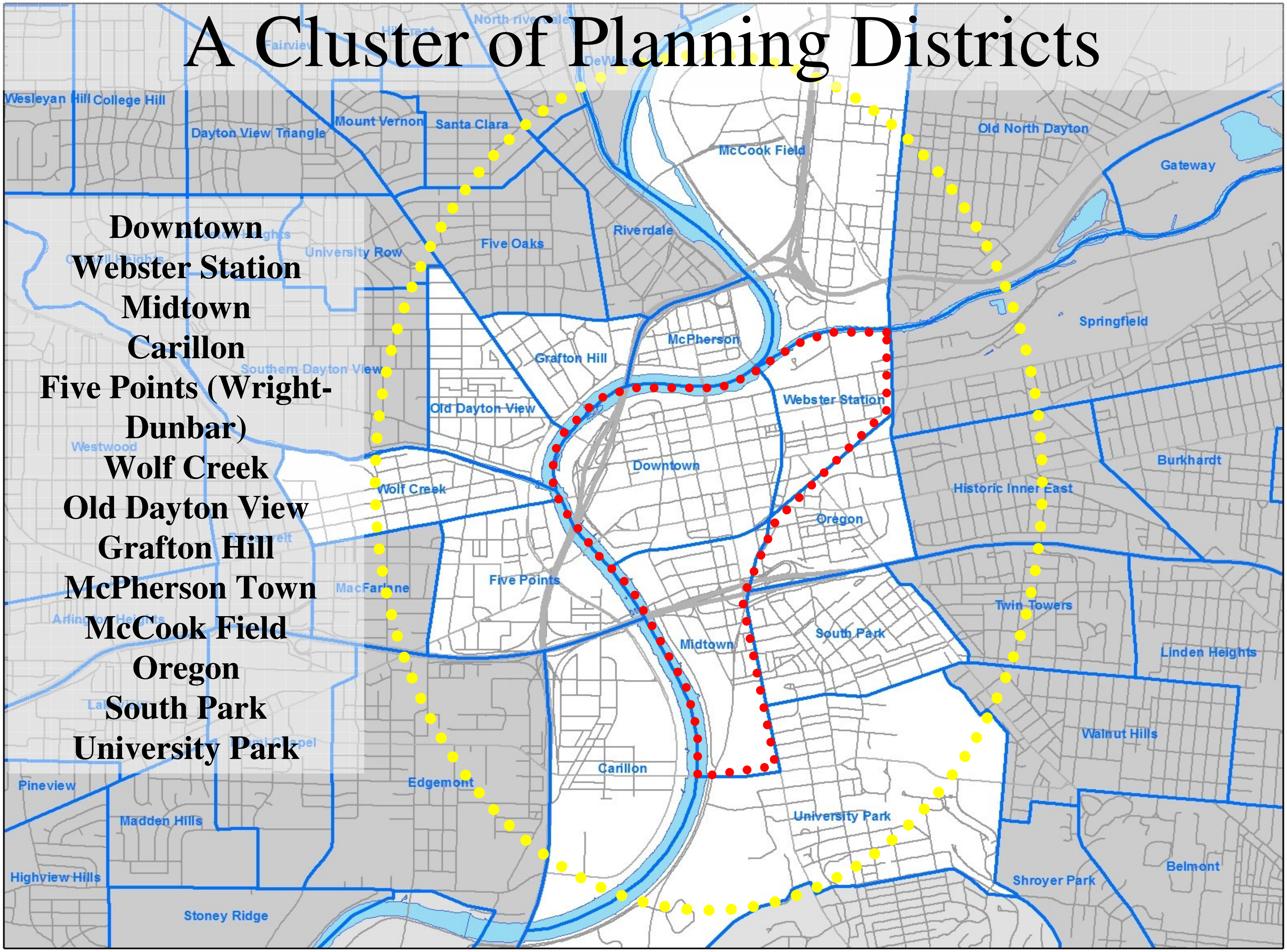

The jobs-generated revenue produced from the Greater Downtown covers 35% to 40% of the cost of providing City services to all city neighborhoods.
The jobs-generated revenue produced from the CBD covers approximately 20% of the cost of providing City services to all city neighborhoods .
Greater
CBD
Downtown

Greater Downtown Population Trends

- Taken as a whole, the total Greater Downtown population increased between 1980 and 2000 as the overall City population declined.
- Individually, some districts demonstrated advances while others declines.
- The CBD and University Park demonstrated increases in population.
- Many housing units built in the CBD in the late 1990's and early 2000's (see charts).
- While reductions in household densities occurred in a number of historic districts (as multi-family structures were returned to single family status) and overall population counts decreased, these areas have exhibited increases in property values that are greater than the city average.
- Additional density reductions occurred with the removal of Edgewood Courts, Metro Gardens and other public housing as well as with nuisance demolitions.

A Cluster of Planning Districts

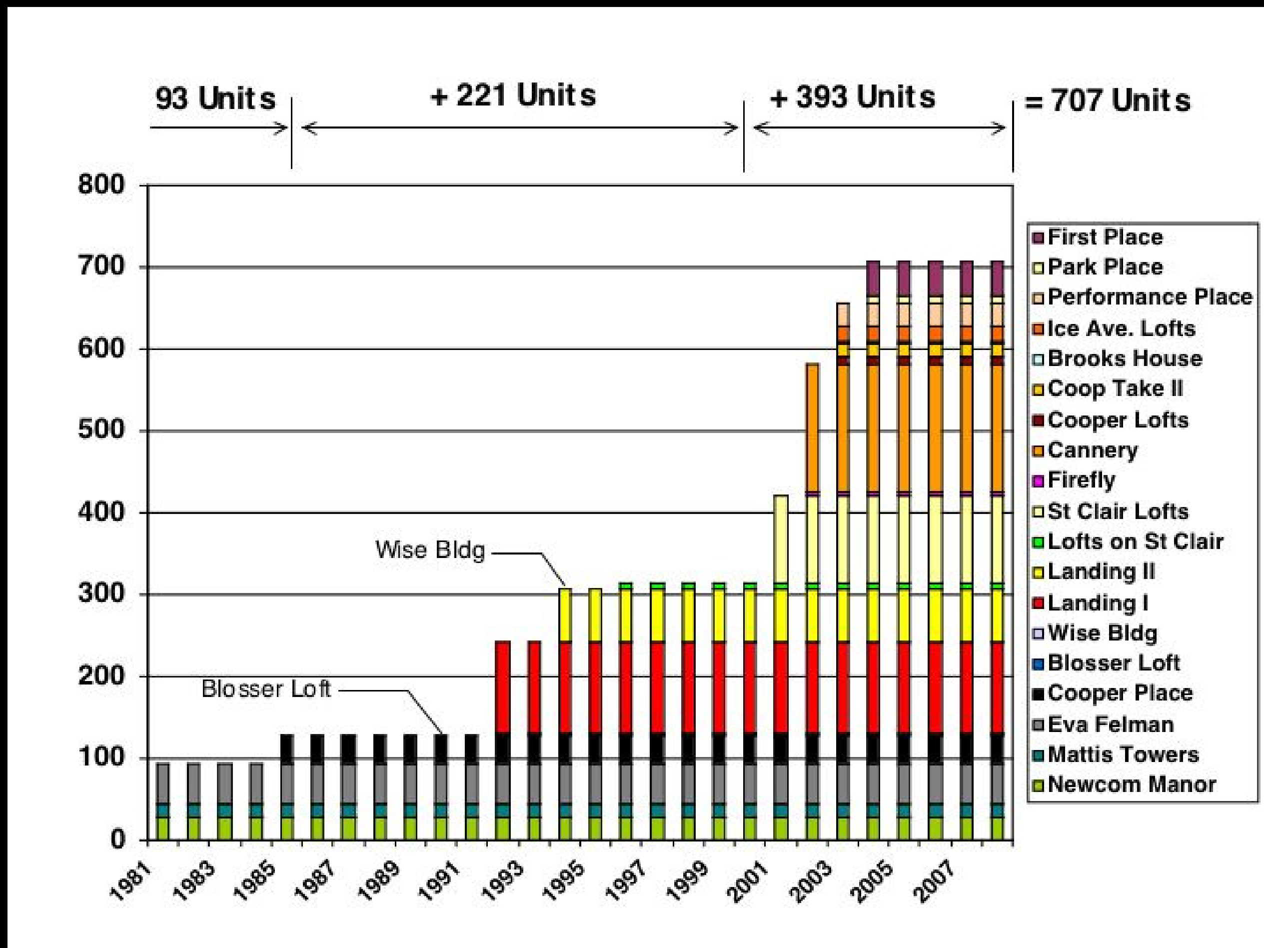
Downtown
Webster Station
Midtown
Carillon
Five Points (Wright-Dunbar)
Wolf Creek
Old Dayton View
Grafton Hill
McPherson Town
McCook Field
Oregon
South Park
University Park



Population, Household & Unit Trends – 1980 - 2000

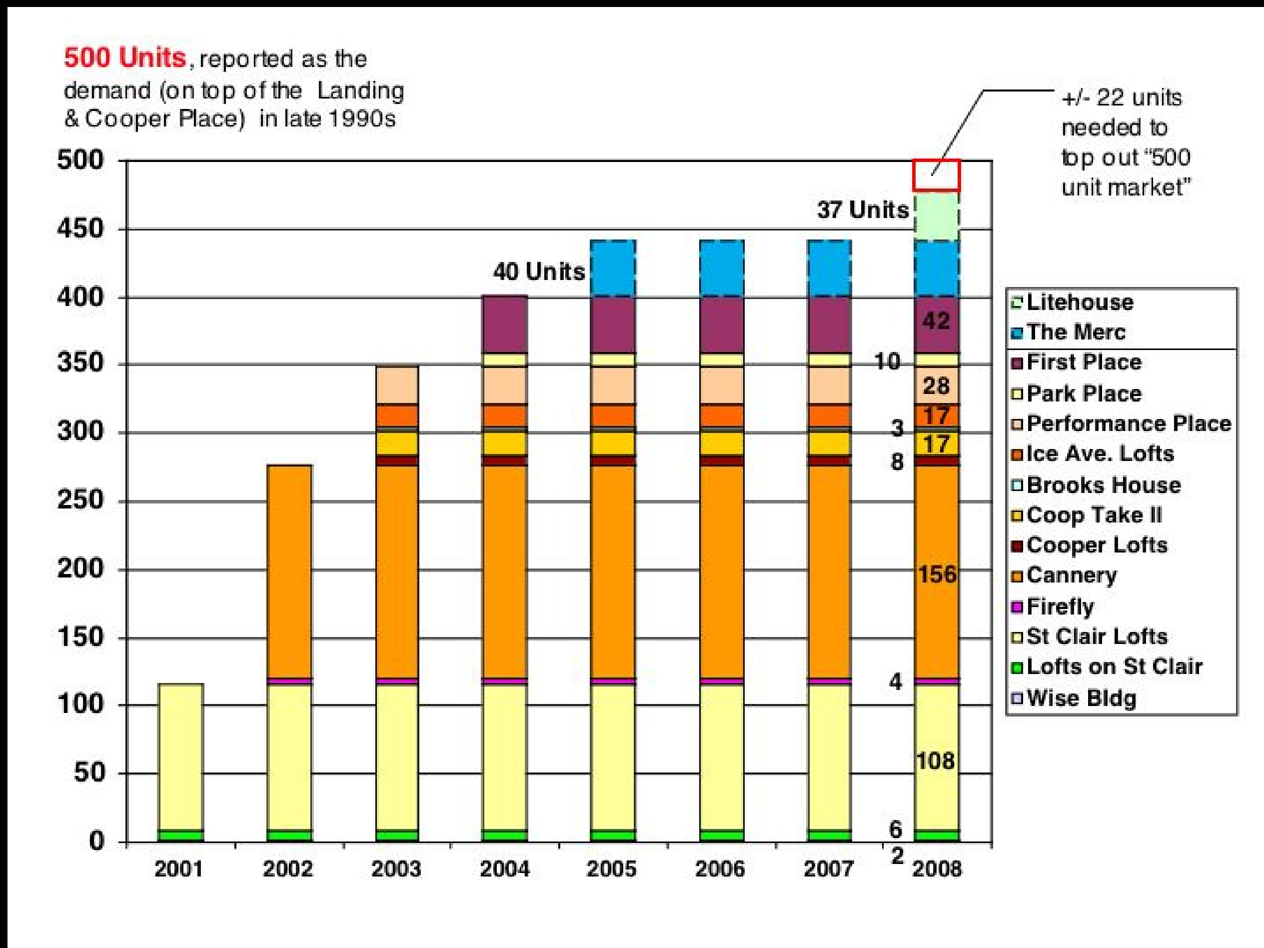
City Totals	**1980**	**1990**	**%**	**1990**	**2000**	**%**	**2007**	**Note**
Population	193,536	182,005	-25%	182,005	166,179	-9%	147,000	-11.5%
Households	76,460	72,670	-11%	72,670	67,409	-7%		
Units	84,213	80,370	-6%	80,370	77321	-4%		
Three Downtown Planning Districts								
Population	1315	1601	+18%	1601	2129	+25%		
Households	NA	830		830	931	+11%		
Units	1150	932	-19%	932	1068	+13%	1461	+16%
Remainder - Greater Downtown								
Population	24,791	19,923	-20%	19,923	20,410	+2.5%		
Households	9,130	7,885	-14%	7885	6677	-15%		
Units	11,242	9,603	-16%	9,603	8,425	-12%		

Addition of Market-Rate CBD Units 1985 to Present*



*http://daytonology.blogspot.com

Detail: Market-Rate Units Added from to 2002 to Present*



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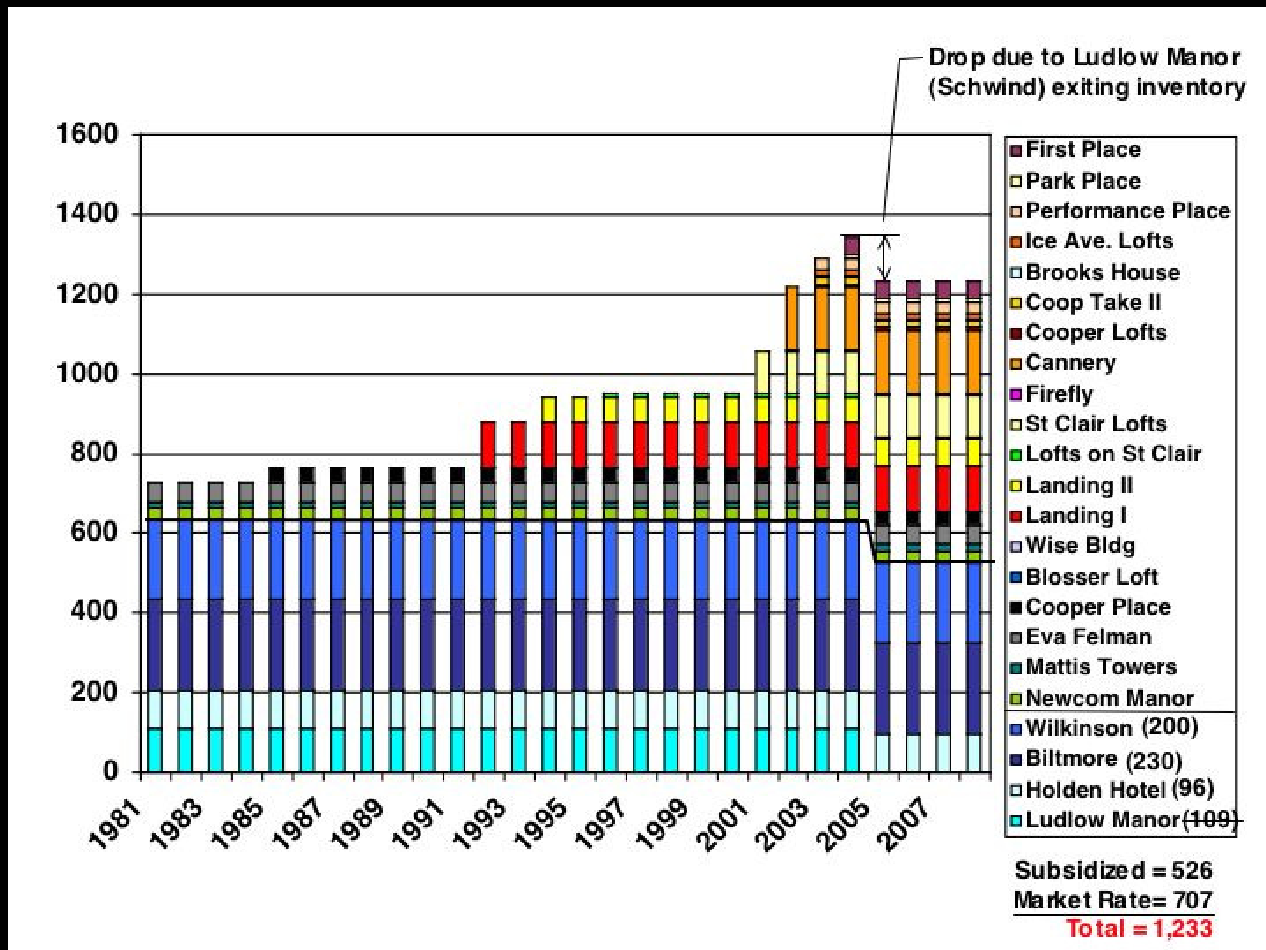
Overall Inventory of CBD Housing Units – 1981 to Present*

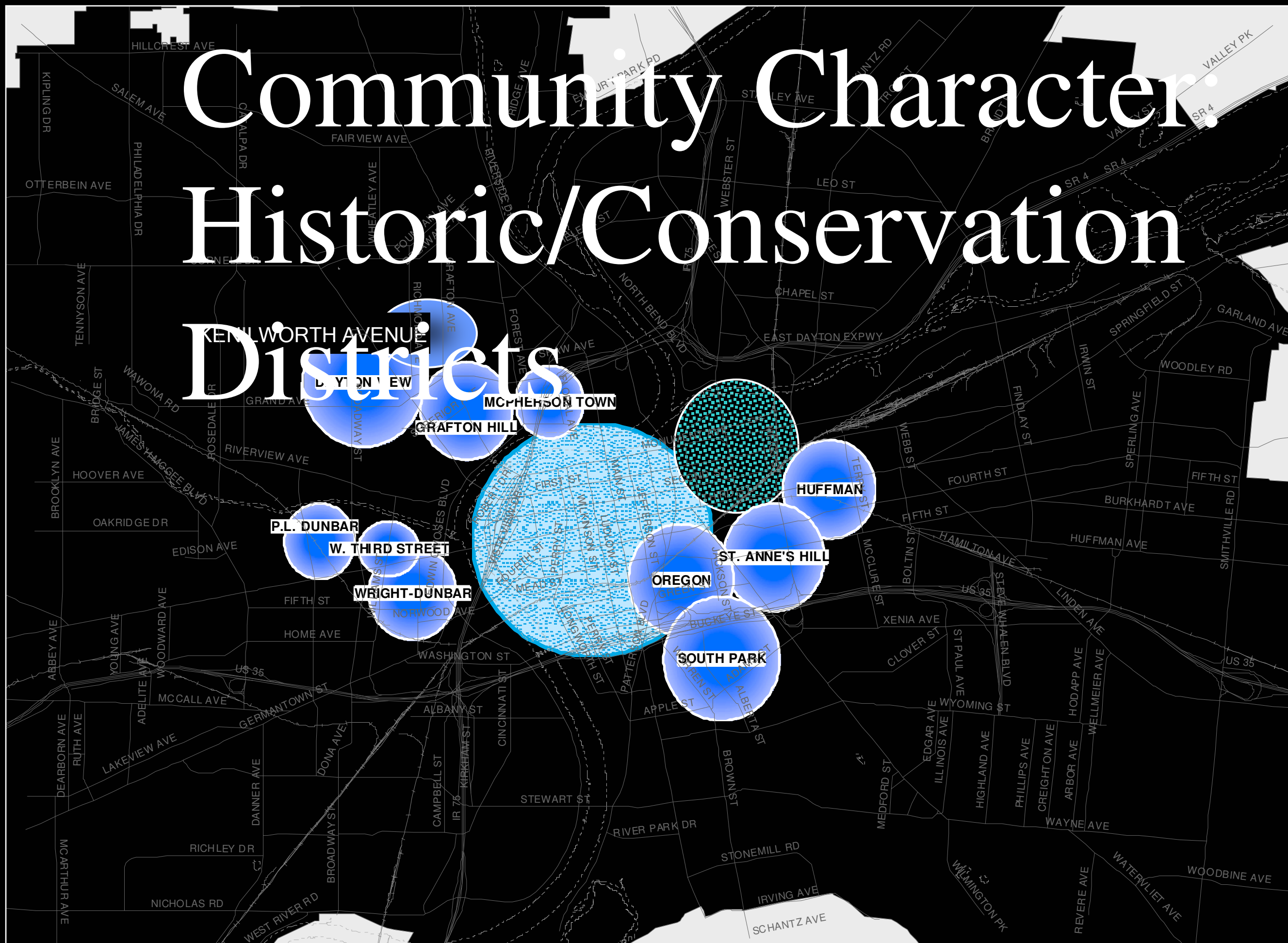


*http://daytonology.blogspot.com

Shifting Trends of Greater Downtown

- Improving, Strengthening, Expanding, Growing, More (Sampling):
  - Unique Housing and Neighborhood Product
    - CBD
      - More market-rate rental and ownership product with strong occupancy (identified previously in presentation)
    - Necklace of Neighborhoods
      - Historic Districts, Webster Station
        - » Oregon, South Park, McPherson Town, Grafton Hill, Dayton View, Wright-Dunbar
        - » On average, assessed values in historic districts are greater than the city average

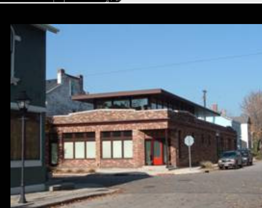
Community Character: Historic/Conservation Districts











The Growth Rings of Historic District Development

Shifting Trends of Greater Downtown

- Improving, Strengthening, Expanding, Growing, More (Sampling):
  - Safety Services – A Paradox
    - While statistically speaking, the CBD continues to be the safest place in the city, there is a perception among some in the community that the CBD is unsafe.

Shifting Trends of Greater Downtown

- Improving, Strengthening, Expanding, Growing, More (Sampling):
  - Institutional Strengthening, Growth & Expansion
    - Education – Sinclair Community College, University of Dayton, Chaminade-Julienne, Ponitz Career Technology Center, DPS Consolidated Montessori, DECA, Stivers, Richard Allen Academy, Miami Jacobs
    - Healthcare – Caresource, Children's, Grandview, Elizabeth Place, Miami Valley Hospital, Good Samaritan
    - Non-Profits – Kroc Center, United Way, Urban League
    - Criminal Justice – Courts, Protective Care, Lawyers
    - Professionals – Attorneys, Marketing & Design, Financial & Insurance Services, Architects, IT Services

Greater Downtown Higher Education – Enrollment Fact Sampling

Institution/ Year	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009
University Of Dayton	10,284	10,496	10,569	10,503	10,396	
Sinclair Community College	22,917	23,241	22,555	22,786	22,443	23,259
Chaminade-Julienne	974	991	932	810	823	
Patterson Career Academy	392	383	400	400	399	415
Miami-Jacobs	450	560	721	714	622	

Children's Medical Center
Miami Valley Hospital
Grandview Hospital
Elizabeth Place
Premier Health Partners
Care Source
Cassano Health Center
Red Cross
United Way
Gospel Mission
University of Dayton
Sinclair Community College
WSU Ellis Institute, Kettering Center
Central State Dayton campus
Miami-Jacobs
Chaminade-Julienne
DECA
Digital High School
DPS – Stivers, Ponitz Career Technology Center, Edison Neighborhood School Center, Montessori Campus, Patterson-Kennedy
Richard Allen Academy
Dayton View Academy
Mary Queen of Peace
Emerson Academy
Kroc Center
Dayton Art Institute
Five Rivers Metro Parks
Aviation National Park
YMCA
YWCA
Miami Conservancy District
Dayton History/Carillon Park
Main Library
EPA
RTA
MVRPC
United States Main Post Office
Montgomery County Administration, Courts and Job Center
City of Dayton
GSA, FBI, FBC, Social Security

Shifting Trends of Greater Downtown

- Improving, Strengthening, Expanding, Growing, More (Sampling):
  - More Cultural, Recreational, Entertainment & Lifestyle Retail:
    - Schuster, Victoria, Fifth Street/Oregon, Zion Center, Library, Churches, Synagogues, Mosques, Aviation National Park, Wright-Dunbar, River Corridor, Miami Conservancy District, Five Rivers, Bicycle Trails, Dayton Dragons, RiverScape, Dayton Art Institute, Masonic Temple, Brown/Warren Corridor, Restaurants, Taverns, Clubs and more

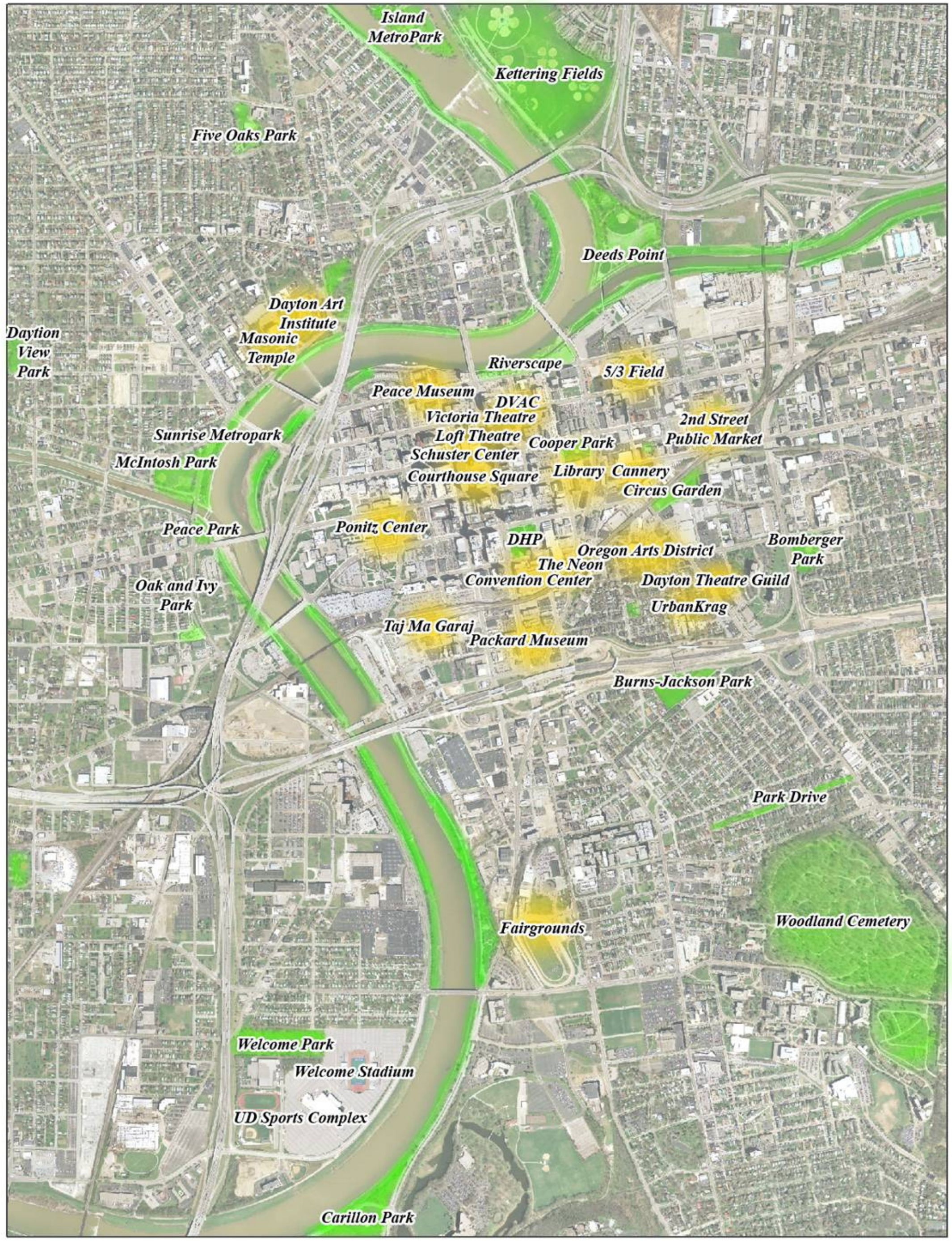
Downtown Visitors – 2007 – A Snapshot

• Oregon Arts District*	1,389,000
• University of Dayton Sports Complex	1,000,000
• Montgomery County's Courthouse Square	990,000
• Dayton Dragons Baseball at Fifth Third Field	600,656
• Dayton Convention Center	500,000
• Dayton Metro Library (Main Branch)	476,669
• RiverScape MetroPark	333,031
• National City 2nd Street Market	240,000
• Schuster Performing Arts Center (Mead & Mathile Theatres)	190,642
• Victoria Theatre	128,989
• The Neon Movies	45,500
• Dayton Visual Arts Center (DVAC)	16,270
• Memorial Hall	14,085
• Blair Hall Theater at Sinclair Community College	12,346
• The Loft Theatre	12,229
• Montgomery County's Old Court House	12,000
• Total	**6,000,000±**

This list is a sampling of attendance figures, and does not reflect attendance at all downtown venues and events. The numbers shown for 2007 attendance reflect the 2007 calendar year or the 2006/2007 performance season.

*Oregon District attendance based on research conducted by the City of Dayton in 1999.

Island Metro Park
Kettering Fields
Five Oaks Park
Deeds Point
Dayton Art Institute
Masonic Temple
Dayton View Park
Sunrise Park
McIntosh Park
Peace Park
Oak and Ivy Park
Zion Center
RiverScape
Fifth-Third Field
Dayton Visual Arts Center
Victoria Theater
Schuster Center
Loft Theater
Cooper Park
Courthouse Square
Historic Old Courthouse
Main Library
Blair Hall at Sinclair
Second Street Market
Ponitz Center at Sinclair
Cannery
Circus Garden
National City Second Street Market
Dave Hall Plaza
Oregon Arts District
The Neon Movies
Canal Street Tavern
Bomberger Park
Stivers School for the Arts
Convention Center
Dayton Theater Guild
Urban Krag
Taj Ma Garage
NewcomPark
Burns-Jackson Park
Park Drive
Woodland Cemetery
County Fairgrounds
Welcome Stadium
University of Dayton Sports Complex
Welcome Park



Greater Downtown Infrastructure & Corridors – 2008 - 2010

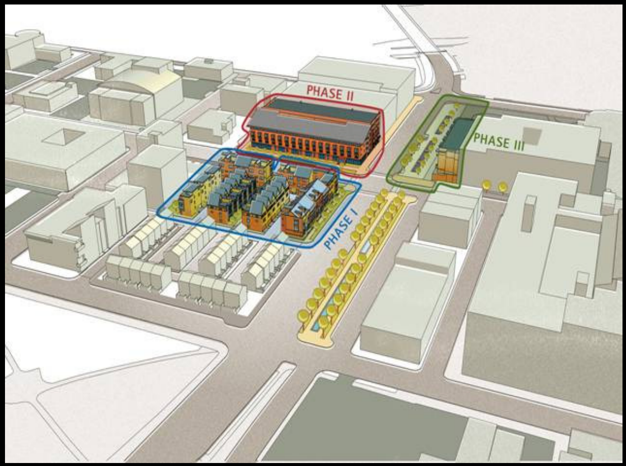
Dayton is working to ‘catch-up’ with maintenance of basic infrastructure and develop consistency in attractiveness & maintenance of strategic corridors. (info assembled by the City of Dayton)

• One-Way/Two-Way (Downtown)	$2.0M
• Main Street Reconstruction (Downtown)	$3.0M
• Great Miami Boulevard (Renaissance)	$6.6M
• Monument Avenue Bridge Rebuild (Renaissance)	$9.2M
• Phase 1-A/I-75 Rebuild (Renaissance/DaVinci)	$123.0M
• Troy/Valley Enhancement – The Point (DaVinci)	$1.0M
• Dayton Expressway Bridge (DaVinci)	$7.6M
• Keowee Street Reconstruction (DaVinci)	$2.3M
• Wright-Dunbar Enhancements (Greater Wright-Dunbar)	$1.8M
• Paul Laurence Dunbar Bridge Project (Greater Wright-Dunbar)	$2.8M
• Edwin C. Moses Bridge Project (Greater Wright-Dunbar)	$5.1M
• Stewart Street Bridge Project (Greater Rubicon Park)	$16.6M
• Stewart Street Reconstruction (Greater Rubicon Park)	$3.6M
• Brown Street Enhancements (Greater Rubicon Park)	$0.3M
• **RUNNING TOTAL**	**$184.9M**

Shifting Trends of Greater Downtown

- Investment
  - There is a steady trend of investment in the CBD and immediate surrounding/adjacent areas that total over $1,500,000,000 from 2001 and projecting forward to 2010.

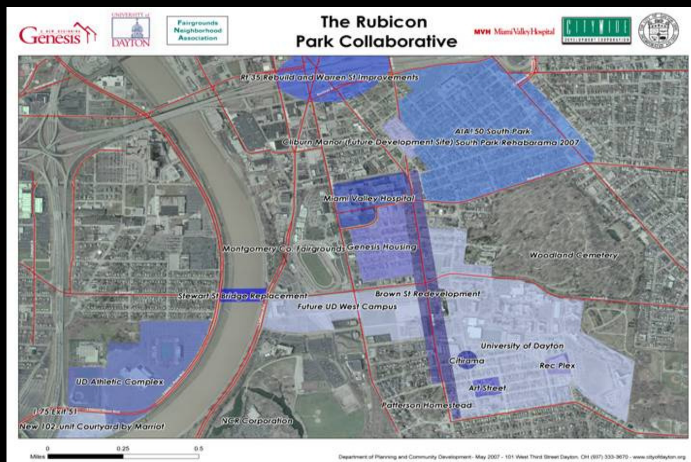
Linked Development: Downtown



- 2001-010 – Projected investment currently at about $600,000,000

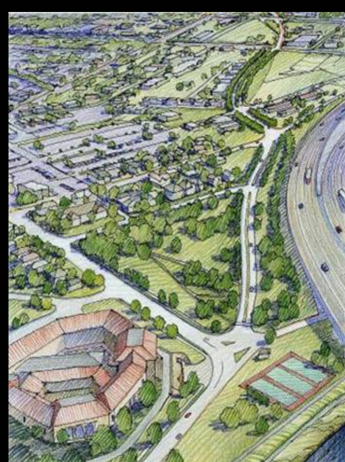
- Build on Investment Momentum & Opportunity (Sampling)
  - Main Street Core
    - Jobs, Amenities & Housing
    - CareSource Headquarters
    - Kuhn's & McCrory Buildings
    - Adaptive reuse of vintage highrises to mixed-use housing
    - RTA Hub
    - One-way/two-way conversion
  - RiverScape
    - Pavilion
  - Webster Station & Cooper Park Neighborhood
    - Tech Town
    - Ball Park District
    - Deeds Point
    - First & Patterson Green Housing
  - Fifth Street Entertainment District
    - Connect Downtown & Oregon

Established Linked Development: Genesis/Greater Rubicon Park



- 2001 – 2010 projected investment currently at about $450,000,000
- Structured with a Funder's Board
- Sampling
  - Miami Valley Hospital Campus Development
  - University of Dayton Master Plan
  - Cliburn Manor Redevelopment
  - 'New' Fairgrounds Neighborhood
    - Complete Fairgrounds Traffic Plan
  - Comprehensive Transportation Plan
    - Stewart Street alignment; Walkable Brown Street; South Main Street as express

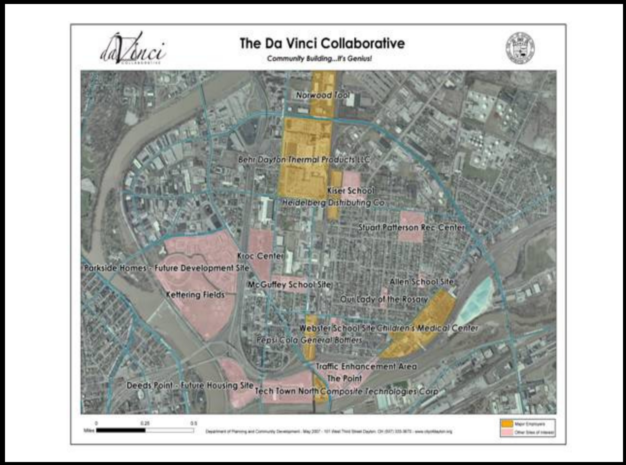
Emergent Linked Development: Renaissance



- 2001 – 2010 projected investment currently at about $250,000,000
- Currently functioning as a Collaborative
- Sampling
  - Grandview Campus Expansion
  - Central Avenue Housing Development
  - Build Out of Salem Crossing (HOPE VI)
  - Monument Avenue Bridge Rebuild
  - Miami Boulevard Connector
  - New Riverfront Montessori School
  - I-75 Rebuild
  - Strategic Demolition/Land Banking
  - Five Oaks Historic Designation(s)

Emergent Linked Development: DaVinci

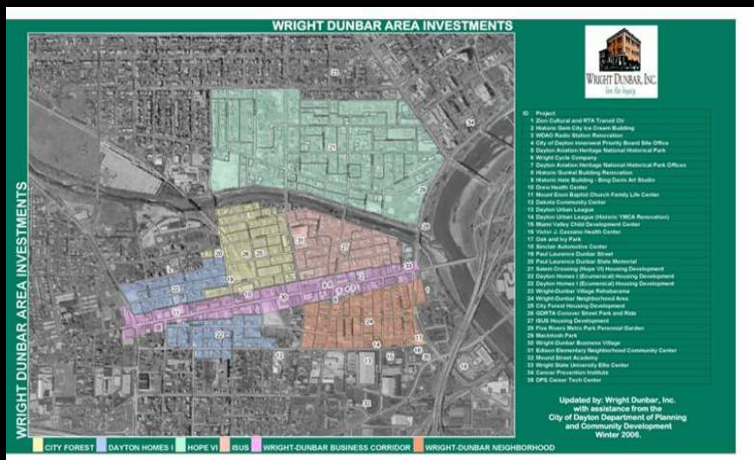
- 2001 – 2010 – projected Investment Currently at about $170,000,000
- Currently functioning as a Collaborative
- Sampling
  - Children's Expansion Project
  - Salvation Army Kroc Center
  - The Point Enhancements
  - Parkside Redevelopment
  - Behr Expansion
  - Kiser and Rosary Neighborhood School Centers
  - I-75 Rebuild



Established Linked Development: E. C. Moses Ed/Med/Rec Corridor

- 2001 – 2010 projected investment currently at about $100,000,000
- Overlapping with other Collaboratives
- Sampling
  - University of Dayton West Campus/Sports Complex
  - Emergent Greater Carillon Community Building Plan
  - DPS Ponitz Career Center
  - New Moses Bridge Over Wolf Creek
  - Transportation Enhancement Project of Third Street from W-D to River
  - Build-out of W-D Village
  - Support Redevelopment of Elizabeth Place Campus
  - Renovation of Welcome Stadium
  - Future Plans for Sinclair

Established CD Collaborative: Greater Wright Dunbar



- 2001 – 2010 projected investment currently at about $110,000,000
- Sampling
  - Edison Neighborhood School Center
  - Housing Build-Out in W-D, Wolf Creek & Broadway
  - WDI – Third Street Redevelopment
  - Paul Laurence Dunbar Bridge - 2008
  - Edwin C. Moses/Wolf Creek Bridge - 2009
  - Transportation Enhancement Project – Connecting West Third from Dunbar to Moses

Summary

- The Greater Downtown is in the midst of a long-term repositioning that is being driven by local, regional and global market forces
- While there continues to be significant churning in the regional commercial office market, the GD is strengthening its positions by focusing on its assets, strengths and uniqueness